March 7, 2007

To: The Broker's Workstation Users

Dear Valued Client:

RE: The Broker's Workstation – Important Releases and Changes

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements and new features to The Broker's Workstation (TBW) product.

1. User Rights for each individual List item:

With this new enhancement the office administrator now has the ability to set the rights for each user on an individual list item.

EX. If the office administrator wants a certain user to have access to Insurance Companies List item, in the user rights they can set this accordingly. (Figure 1)
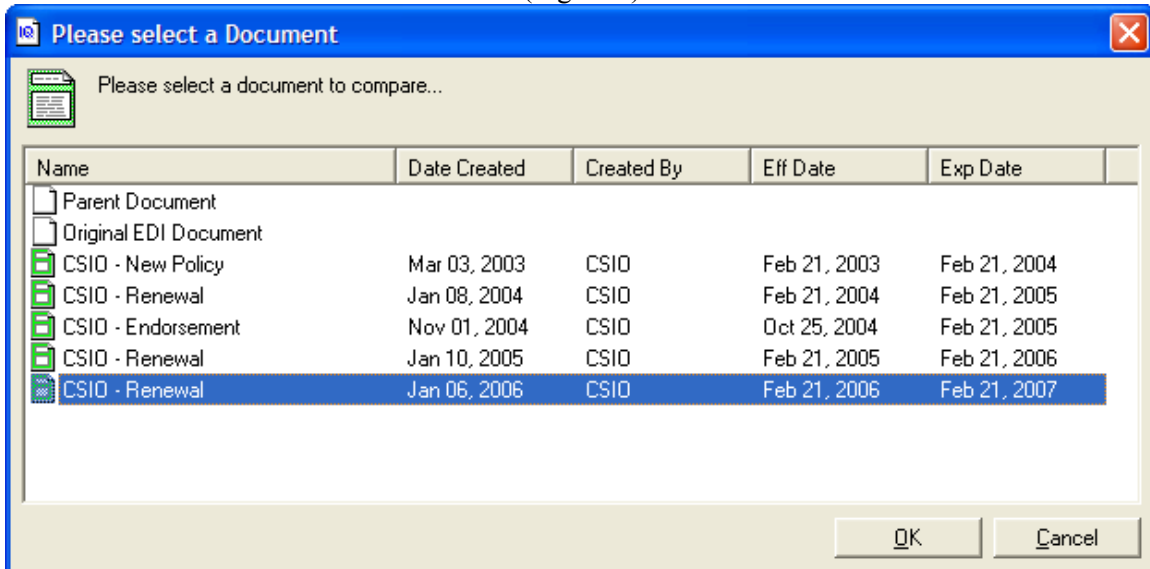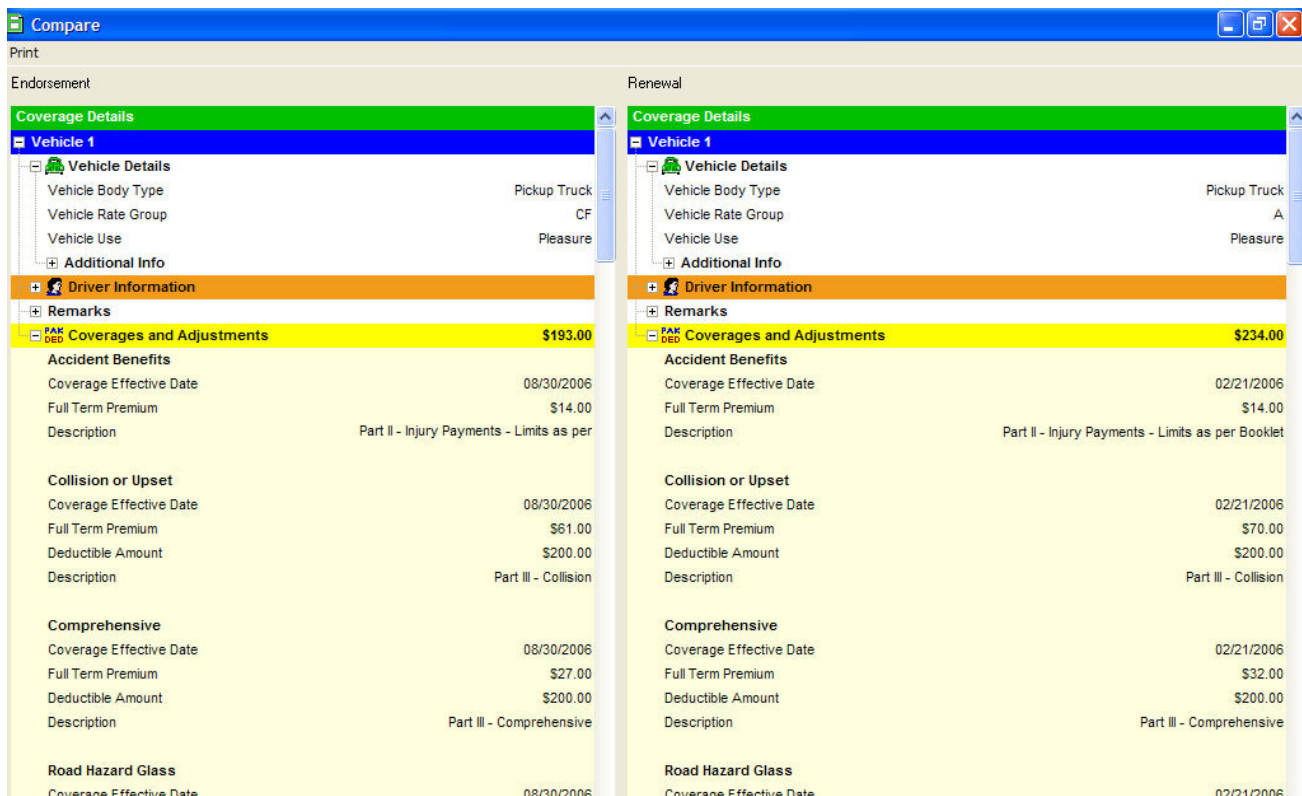
(Figure1)

2. **Compare CSIO Static view**:

This new feature allows CSIO download users to compare the CSIO Static View with another CSIO download policy. To use this feature, open a CSIO downloaded policy and go to the CSIO Static View tab. Once there, the user will find a new icon called 'compare' on the toolbar that will look like the following ⬜⬜. After this icon is selected a screen will come up asking the user to choose which document they would like to compare with (Figure 2). Once a document is chosen then the user will be presented with the compare screen as shown in (Figure 3).
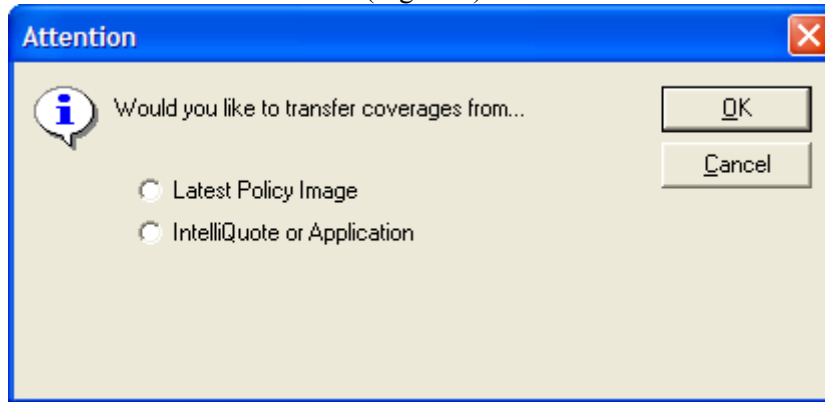
(Figure 2)

Name	Date Created	Created By	Eff Date	Exp Date
Parent Document				
Original EDI Document				
CSIO - New Policy	Mar 03, 2003	CSIO	Feb 21, 2003	Feb 21, 2004
CSIO - Renewal	Jan 08, 2004	CSIO	Feb 21, 2004	Feb 21, 2005
CSIO - Endorsement	Nov 01, 2004	CSIO	Oct 25, 2004	Feb 21, 2005
CSIO - Renewal	Jan 10, 2005	CSIO	Feb 21, 2005	Feb 21, 2006
CSIO - Renewal	Jan 06, 2006	CSIO	Feb 21, 2006	Feb 21, 2007

Please select a Document

Please select a document to compare...

OK   Cancel

(Figure 3)

Compare

Print

| Endorsement		Renewal	
Coverage Details		**Coverage Details**	
Vehicle 1		**Vehicle 1**	
Vehicle Details		**Vehicle Details**	
Vehicle Body Type	Pickup Truck	Vehicle Body Type	Pickup Truck
Vehicle Rate Group	CF	Vehicle Rate Group	A
Vehicle Use	Pleasure	Vehicle Use	Pleasure
Additional Info		Additional Info	
Driver Information		**Driver Information**	
Remarks		Remarks	
Coverages and Adjustments	$193.00	**Coverages and Adjustments**	$234.00
Accident Benefits		**Accident Benefits**	
Coverage Effective Date	08/30/2006	Coverage Effective Date	02/21/2006
Full Term Premium	$14.00	Full Term Premium	$14.00
Description	Part II - Injury Payments - Limits as per	Description	Part II - Injury Payments - Limits as per Booklet
Collision or Upset		**Collision or Upset**	
Coverage Effective Date	08/30/2006	Coverage Effective Date	02/21/2006
Full Term Premium	$61.00	Full Term Premium	$70.00
Deductible Amount	$200.00	Deductible Amount	$200.00
Description	Part III - Collision	Description	Part III - Collision
Comprehensive		**Comprehensive**	
Coverage Effective Date	08/30/2006	Coverage Effective Date	02/21/2006
Full Term Premium	$27.00	Full Term Premium	$32.00
Deductible Amount	$200.00	Deductible Amount	$200.00
Description	Part III - Comprehensive	Description	Part III - Comprehensive
Road Hazard Glass		**Road Hazard Glass**	
Coverage Effective Date	08/30/2006	Coverage Effective Date	02/21/2006

3. **Manual Renewal Coverage Prompt:**

With this new feature, the user will be prompted when doing a new manual renewal. When a manual renewal is dropped on manual new policy the following screen will prompt (Figure 4), user has a choice of where they would like to transfer coverages from.
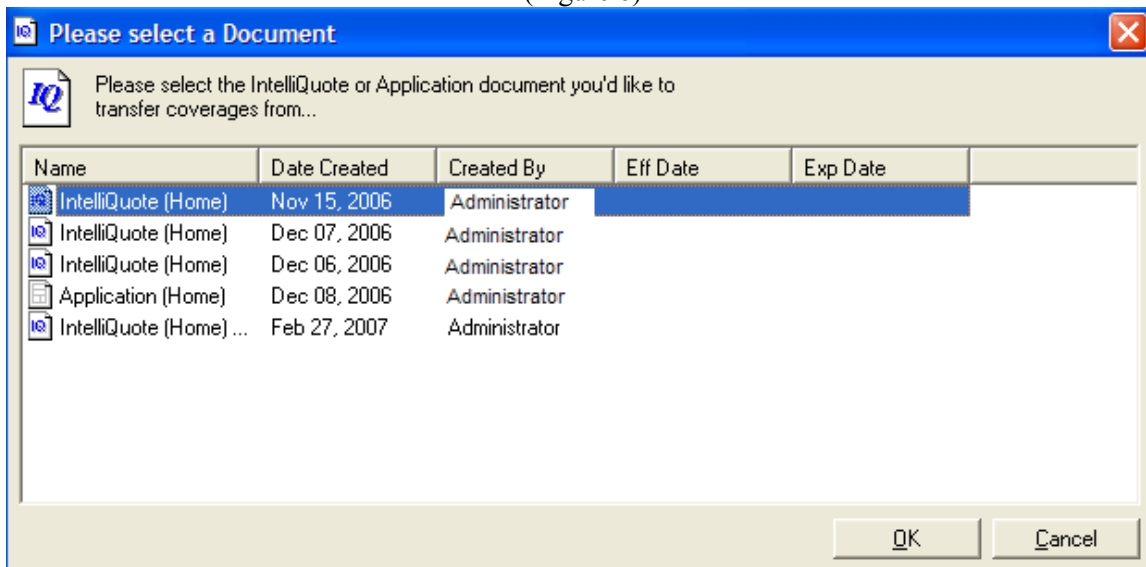
(Figure 4)

If they select **"Latest Policy Image"** it will continue going through the normal renewal policy screens transferring coverages from the latest policy image provided they are there. If the latest policy image does not have coverages, user will be prompted if they want to transfer them from other documents. Once a document has been selected, then normal renewal screens will follow. (Figure 5)

(Figure 5)
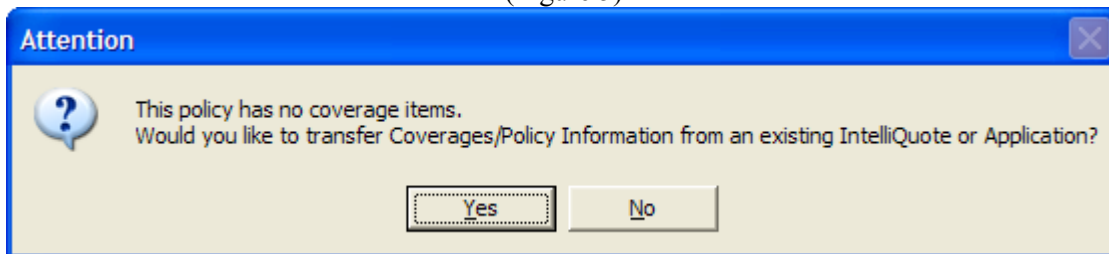
If the user selects **"IntelliQuote or Application"** (from Figure 4) then it will pop up a list of available Intelliquote's or Applications to choose from (Figure 6).

(Figure 6)

If there are no Applications or Intelliquote's in the folder it will pop up a message saying so. (Figure 7)

(Figure 7)

TBWPolicy

There are no IntelliQuote or Applications available.

OK
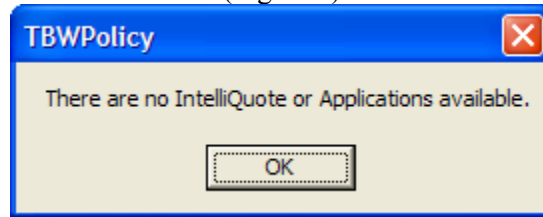
4. **Convert Primary:**

User now has the option of right clicking the primary dwelling on any Habitational Policy and choosing to convert it to any other policy type (eg. Home to Condo, Tenant to Seasonal, Condo to FEC...etc). This option is only available under the Optional Coverages screen on the IQ. (Figure 8)

(Figure 8)
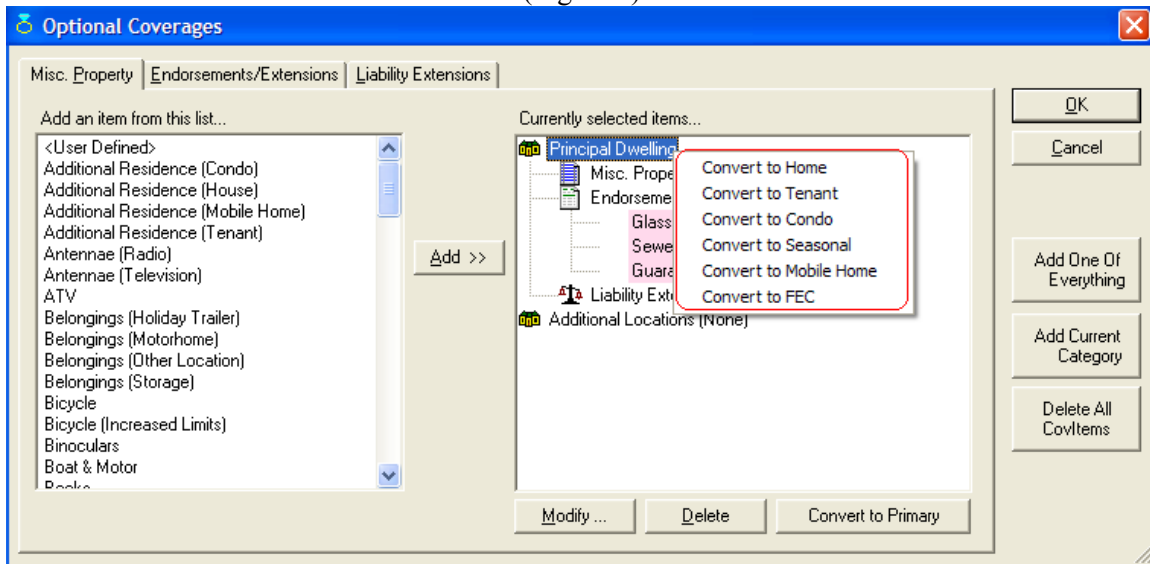
When converting the primary the user will be prompted that they are about to change the policy type from "A" to "B". If user chooses to continue IQ will do the following...
1) Will change the policy type
2) Will strip out any coverages/endorsements/extensions that are not applicable to the new policy type
3) Will Add/Remove fields on the primary item to match the new policy type
4) Most importantly...will preserve all the data it can on the primary dwelling.

When complete it will indicate if change was successful or not. Then user will be prompt to go thru all IQ screens to ensure all data is correct. Once complete the user should recalculate the IQ to update all rating.

This option is also available when using coverages thru any Policy or Request entry. When the user is finished with the IQ coverage screens, before posting the changes, user will be prompt with a message stating that policy type has changed and new policy type should be selected. (Figure 9)

(Figure 9)
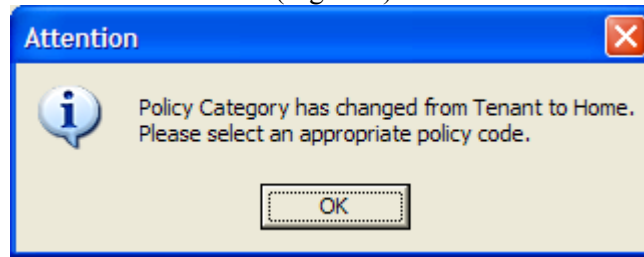
5. **Edit Policy Coverages By item:**
   While working on an endorsement requesting coverages, users can now click on a line item in the TBW Coverages view and it will take them to that screen to make any changes. Once the changes have been made the request will continue through the remaining IQ screens and recalculate the new changes (Figure 10). The options to right click edit the request and going to TBW Coverages add/edit are also still available if user desires.

(Figure 10)
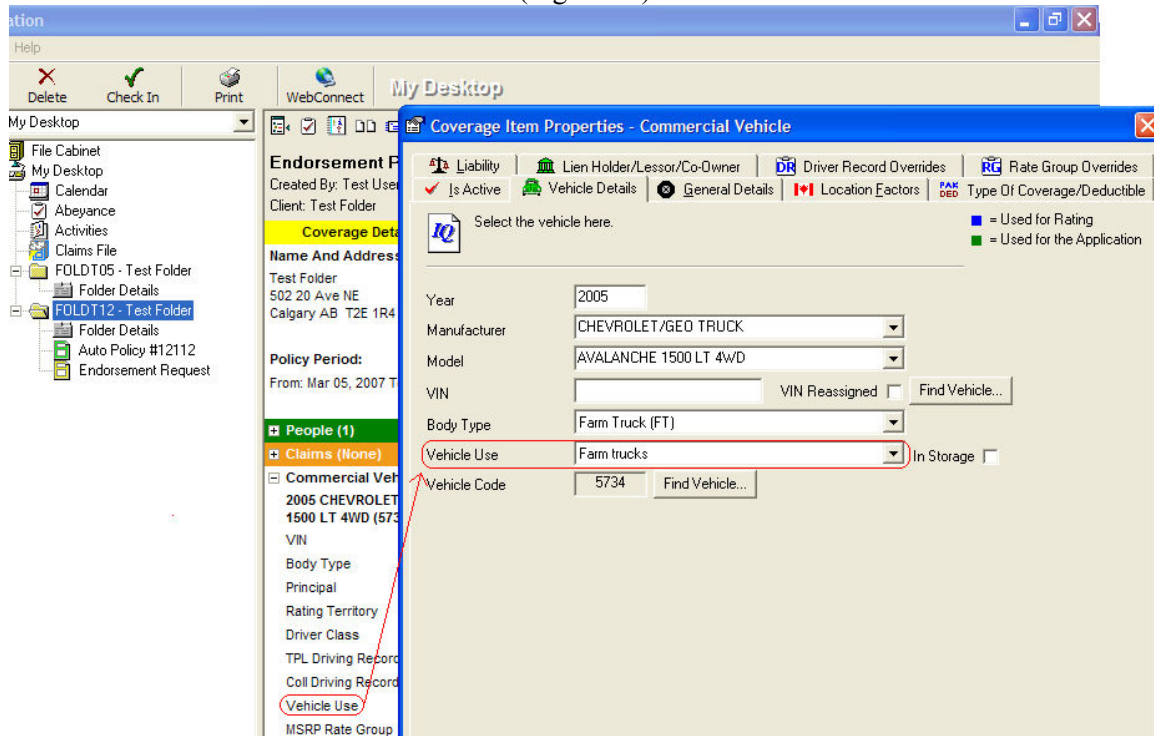
Please run the TBW Remote Update Utility to access these changes. For assistance in using these new features, please contact our Support Team at 1-888-291-3588.

Please share this information with all TBW users in your office(s) and thank you for using TBW.

Yours truly,

Custom Software
SOLUTIONS INC.